Appendix A
LSR Guidance from Northwest Forest Plan ROD
Pages C-9 to C-21
and REO Memorandums

C. Standards and Guidelines

Late-Successional Reserves

Acres

Key and non-Key Watersheds are specified for all areas, and therefore overlay all other land allocations. For the portion of Late-Successional Reserves located within Key Watersheds, standards and guidelines for Key Watersheds (see Key Watersheds on page C-7, and the Aquatic Conservation Strategy starting on page B-9 of these standards and guidelines), as well as standards and guidelines for Late-Successional Reserves (listed below) apply. See additional detail under Hierarchy of Standards and Guidelines on page C-1.

Late-Successional Reserves within Tier 1 Key Watersheds 3,151,700
Late-Successional Reserves within Tier 2 Key Watersheds 279,100
Late-Successional Reserves within non-Key (other) Watersheds..... 4,000,000
Total Late-Successional Reserves 7,430,800

Acreage of Riparian Reserves is not calculated within Late-Successional Reserves for these standards and guidelines. However, Riparian Reserve standards and guidelines affect approximately 40 percent of Late-Successional Reserves.

Description

The objective of Late-Successional Reserves is to protect and enhance conditions of late-successional and old-growth forest ecosystems, which serve as habitat for late-successional and old-growth related species including the northern spotted owl.

Late-Successional Reserves have been designated based on five elements: (1) areas mapped as part of an interacting reserve system; (2) LS/OG 1 and 2 areas within Marbled Murrelet Zone 1, and certain owl additions, mapped by the Scientific Panel on Late-Successional Forest Ecosystems (1991); (3) sites occupied by marbled murrelets; (4) known owl activity centers; and (5) Protection Buffers for specific endemic species identified by the Scientific Analysis Team (SAT)(1993). Additional areas, such as 600 acres around known sites of fungus species *Oxyporous nobilissimus*, are protected under the survey and management standards and guidelines starting on page C-4 of these standards and guidelines. Details are as follows.

1. Mapped Late-Successional Reserves

Most Late-Successional Reserves are mapped areas, shown on the Alternative 9 map that was included with the Final SEIS and described on page A-6 of these standards and guidelines. They were designed to incorporate Key Watersheds to the extent possible, while remaining consistent with other objectives. They also incorporate some or parts of LS/OG1s and LS/OG2s (most ecologically significant, and ecologically significant late-successional and old-growth forests, respectively, from the Scientific Panel on Late-Successional Forest Ecosystems [1991] and some or parts of the Designated Conservation Areas (DCAs) from the Final Draft Spotted Owl Recovery Plan in the western portion of the range of the northern spotted owl.

2. LS/OG 1s and 2s

Also shown on the Alternative 9 map, all LS/OG1s and LS/OG2s within Marbled Murrelet Zone 1, except in the Quinault Special Management Area, are Late-Successional Reserve, as are owl additions mapped by the Scientific Panel on Late-Successional Forest Ecosystems (1991) within the Finney and Northern Coast Adaptive

Management Areas. Where LS/OG status is used to define the boundaries of a Late-Successional Reserve, the boundaries are fixed regardless of the future condition of those (or other) stands.

3. Occupied Marbled Murrelet Sites

The area close to marine environments associated with most marbled murrelet activity is referred to as Marbled Murrelet Zone 1. Zone 1 extends approximately 40 miles inland in Washington, 35 miles inland in Oregon, 25 miles inland in California north of Fort Bragg, and 10 miles inland south of Fort Bragg. Zone 2 is defined for survey purposes and does not affect land allocations. Both Marbled Murrelet Zones 1 and 2 are shown on the Alternative 9 map that was included with the Final SEIS. However, for survey purposes only, some portions of these zones are being remapped to be consistent with the above description. (See also page A-6. This remapping does not LS/OGs reserved under #2 above.)

Preproject surveys of marbled murrelet habitat are required according to protocol currently used by the federal agencies. Current protocol requires 2 years of surveys to assure that no marbled murrelet nests exist in areas planned for timber harvest. If behavior indicating occupation is documented (described below), all contiguous existing and recruitment habitat for marbled murrelets (i.e., stands that are capable of becoming marbled murrelet habitat within 25 years) within a 0.5-mile radius will be protected. The 0.5-mile radius circle should be centered on either the behavior indicating occupation, or within 0.5 mile of the location of the behavior, whichever maximizes interior old-growth habitat. When occupied areas are close to each other, the 0.5-mile circles may overlap.

Behavior indicating marbled murrelet occupation includes at least one of the following: (1) discovery of an active nest or a recent nest site as evidenced by a fecal ring or eggshell fragments; (2) discovery of a chick or eggshell fragments on the forest floor; (3) birds flying below, through, into, or out of the forest canopy within or adjacent to a stand; (4) birds perching, landing, or attempting to land on branches; (5) birds calling from a stationary location within the stand; (6) birds flying in small or large radius circles above the canopy.

4. Known Spotted Owl Activity Centers

This standard and guideline applies to known spotted owl activity centers that are not protected by Congressionally Reserved Areas, Late-Successional Reserves, Riparian Reserves, Managed Late-Successional Areas, or Administratively Withdrawn Areas. One hundred acres of the best northern spotted owl habitat will be retained as close to the nest site or owl activity center as possible for all known (as of January 1, 1994) spotted owl activity centers located on federal lands in the matrix and Adaptive Management Areas. This is intended to preserve an intensively used portion of the breeding season home range. “Activity center” is defined as an area of concentrated activity of either a pair of spotted owls or a territorial single owl. Timber management activities within the 100-acre area should comply with management guidelines for Late-Successional Reserves. Management around this area will be designed to reduce risks of natural disturbance. Because these areas are considered important to meeting objectives for species other than spotted owls, these areas are to be maintained even if they become no longer occupied by spotted owls.

5. Protection Buffers

Unmapped Late-Successional Reserves result from the application of Protection Buffers (see standards and guidelines below).

Standards and Guidelines

Also see Standards and Guidelines Common to all Land Allocations starting on page C-2 of these standards and guidelines.

Objectives - Late-Successional Reserves are to be managed to protect and enhance conditions of late-successional and old-growth forest ecosystems, which serve as habitat for late-successional and old-growth related species including the northern spotted owl. These reserves are designed to maintain a functional, interacting, late-successional and old-growth forest ecosystem. See additional information in the Ecological Principles for Management of Late-Successional Forests discussion in Section B of these standards and guidelines.

Exceptions - Research Natural Areas and activities required by recovery plans for listed threatened and endangered species take precedence over Late-Successional Reserve standards and guidelines.

Management Assessment for Late-Successional Reserves - A management assessment should be prepared for each large Late-Successional Reserve (or group of smaller Late- Successional Reserves) before habitat manipulation activities are designed and implemented. Land management agencies may choose to develop these assessments as components of legally-mandated plans (e.g., Forest or District Plans), as part of province-level planning, or as stand-alone assessments. If developed to stand alone, the assessments should be closely coordinated with subsequent watershed analysis and province-level planning. Standards and guidelines should be refined at the province level, prior to development of Late-Successional Reserve assessments. Late-Successional Reserve assessments should generally include: (1) a history and inventory of overall vegetative conditions within the reserve, (2) a list of identified late-successional associated species known to exist within the Late-Successional Reserve and information on their locations, (3) a history and description of current land uses within the reserve, (4) a fire management plan, (5) criteria for developing appropriate treatments, (6) identification of specific areas that could be treated under those criteria, (7) a proposed implementation schedule tiered to higher order (i.e., larger scale) plans, and (8) proposed monitoring and evaluation components to help evaluate if future activities are carried out as intended and achieve desired results. Only in unusual circumstances would silvicultural treatments, including prescribed fire, precede preparation of this management assessment. Late-Successional Reserve assessments are subject to review by the Regional Ecosystem Office. Until Late-Successional Reserve assessments are completed, fire suppression activities should be guided by land allocation objectives in coordination with local resource management specialists.

Occupied Marbled Murrelet Sites - Timber harvest is prohibited within occupied marbled murrelet habitat at least until completion of the Marbled Murrelet Recovery Plan. Silvicultural treatments in non-habitat within the 0.5-mile circle must protect or enhance the suitable or replacement habitat. When objectives of the Marbled Murrelet Recovery Plan have been identified, management direction will be amended or revised as appropriate.

Silviculture

Thinning or other silvicultural treatments inside reserves are subject to review by the Regional Ecosystem Office to ensure that the treatments are beneficial to the creation of late-successional forest conditions. The Regional Ecosystem Office may develop criteria that would exempt some activities from review. Stand and vegetation management of any kind, including prescribed burning, is considered a silvicultural treatment. Excepted from review are reforestation activities legally required by, and planned as part of, existing sold timber sales, where the reforestation prescription has been modified as appropriate to meet the objectives of the Late-Successional Reserve.

Activities permitted in the western and eastern portions of the northern spotted owl's range are described separately below. Salvage of dead trees is described separately below, and is limited to stand-replacing disturbance events exceeding 10 acres.

West of the Cascades - There is no harvest allowed in stands over 80 years old (110 years in the Northern Coast Adaptive Management Area). Thinning (precommercial and commercial) may occur in stands up to 80 years old regardless of the origin of the stands (e.g., plantations planted after logging or stands naturally regenerated after fire or blowdown). The purpose of these silvicultural treatments is to benefit the creation and maintenance of late-successional forest conditions. Examples of silvicultural treatments that may be considered beneficial include

thinnings in existing even-age stands and prescribed burning. For example, some areas within Late-Successional Reserves are actually young single-species stands. Thinning these stands can open up the canopy, thereby increasing diversity of plants and animals and hastening transition to a forest with mature characteristics.

East of the Cascades and in the Oregon and California Klamath Provinces - Given the increased risk of fire in these areas due to lower moisture conditions and the rapid accumulation of fuels in the aftermath of insect outbreaks and drought, additional management activities are allowed in Late-Successional Reserves. Guidelines to reduce risks of large-scale disturbance are as follows:

Guidelines to Reduce Risks of Large-Scale Disturbance - Large-scale disturbances are natural events, such as fire, that can eliminate spotted owl habitat on hundreds or thousands of acres. Certain risk management activities, if properly planned and implemented, may reduce the probability of these major stand-replacing events. There is considerable risk of such events in Late-Successional Reserves in the Washington and Oregon Eastern Cascades, and California Cascades Provinces and a lesser risk in the Oregon and California Klamath Provinces. Elevated risk levels are attributed to changes in the characteristics and distribution of the mixed-conifer forests resulting from past fire protection. These forests occur in drier environments, have had repeated insect infestations, and are susceptible to major fires. Risk reduction efforts are encouraged where they are consistent with the overall recommendations in these guidelines.

Silvicultural activities aimed at reducing risk shall focus on younger stands in Late-Successional Reserves. The objective will be to accelerate development of late-successional conditions while making the future stand less susceptible to natural disturbances. Salvage activities should focus on the reduction of catastrophic insect, disease, and fire threats. Treatments should be designed to provide effective fuel breaks wherever possible. However, the scale of salvage and other treatments should not generally result in degeneration of currently suitable owl habitat or other late-successional conditions.

In some Late-Successional Reserves in these provinces, management that goes beyond these guidelines may be considered. Levels of risk in those Late-Successional Reserves are particularly high and may require additional measures. Consequently, management activities designed to reduce risk levels are encouraged in those Late-Successional Reserves even if a portion of the activities must take place in currently late-successional habitat. While risk-reduction efforts should generally be focused on young stands, activities in older stands may be appropriate if: (1) the proposed management activities will clearly result in greater assurance of long-term maintenance of habitat, (2) the activities are clearly needed to reduce risks, and (3) the activities will not prevent the Late-Successional Reserves from playing an effective role in the objectives for which they were established.

Such activities in older stands may also be undertaken in Late-Successional Reserves in other provinces if levels of fire risk are particularly high.

Guidelines for Salvage

Salvage of dead trees is based on the following standards and guidelines, and is subject to review by the Regional Ecosystem Office. The Regional Ecosystem Office may develop criteria that would exempt some activities from review. Salvage of dead trees is not generally considered a silvicultural treatment within the context of these standards and guidelines.

Salvage is defined as the removal of trees from an area following a stand-replacing event such as those caused by wind, fires, insect infestations, volcanic eruptions, or diseases. Salvage guidelines are intended to prevent negative effects on late-successional habitat, while permitting some commercial wood volume removal. In some cases, salvage operations may actually facilitate habitat recovery. For example, excessive amounts of coarse woody debris may interfere with stand regeneration activities following some disturbances. In other cases, salvage may help reduce the risk of future stand-replacing disturbances. While priority should be given to salvage in areas

where it will have a positive effect on late-successional forest habitat, salvage operations should not diminish habitat suitability now or in the future.

Tree mortality is a natural process in a forest ecosystem. Diseased and damaged trees are key structural components of late-successional forests. Accordingly, management planning for Late-Successional Reserves must acknowledge the considerable value of retaining dead and dying trees in the forest as well as the benefits from salvage activities.

In all cases, planning for salvage should focus on long-range objectives, which are based on desired future condition of the forest. Because Late-Successional Reserves have been established to provide high quality habitat for species associated with late-successional forest conditions, management following a stand-replacing event should be designed to accelerate or not impede the development of those conditions. The rate of development of this habitat will vary among provinces and forest types and will be influenced by a complex interaction of stand-level factors that include site productivity, population dynamics of live trees and snags, and decay rates of coarse woody debris. Because there is much to learn about the development of species associated with these forests and their habitat, it seems prudent to only allow removal of conservative quantities of salvage material from Late-Successional Reserves and retain management opportunities until the process is better understood.

The following guidelines are general. Specific guidelines should be developed for each physiographic province, and possibly for different forest types within provinces.

1. The potential for benefit to species associated with late-successional forest conditions from salvage is greatest when stand-replacing events are involved. Salvage in disturbed sites of less than 10 acres is not appropriate because small forest openings are an important component of old-growth forests. In addition, salvage should occur only in stands where disturbance has reduced canopy closure to less than 40 percent, because stands with more closure are likely to provide some value for species associated with these forests.

2. Surviving trees will provide a significant residual of larger trees in the developing stand. In addition, defects caused by fire in residual trees may accelerate development of structural characteristics suitable for associated species. Also, those damaged trees that eventually die will provide additional snags. Consequently, all standing live trees should be retained, including those injured (e.g., scorched) but likely to survive. Inspection of the cambium layer can provide an indication of potential tree mortality.

3. Snags provide a variety of habitat benefits for a variety of wildlife species associated with late-successional forests. Accordingly, following stand-replacing disturbance, management should focus on retaining snags that are likely to persist until late-successional conditions have developed and the new stand is again producing large snags. Late-successional conditions are not associated with stands less than 80 years old.

4. Following a stand-replacing disturbance, management should retain adequate coarse woody debris quantities in the new stand so that in the future it will still contain amounts similar to naturally regenerated stands. The analysis that determines the amount of coarse woody debris to leave must account for the full period of time before the new stand begins to contribute coarse woody debris. As in the case of snags, province-level specifications must be provided for this guideline. Because coarse woody debris decay rates, forest dynamics, and site productivity undoubtedly will vary among provinces and forest types, the specifications also will vary.

   Province-level plans will establish appropriate levels of coarse woody debris and decay rates to be used. Levels will be “typical” and will not require retention of all material where it is highly concentrated, or too small to contribute to coarse woody debris over the long timeframes discussed. This standard and guideline represents one item to be considered and may indeed result in no salvage following windthrow in low density stands. As for other management activities, it is expected that salvage standards and guidelines will be refined through the implementation and adaptive management processes.

5. Some salvage that does not meet the preceding guidelines will be allowed when salvage is essential to reduce the future risk of fire or insect damage to late-successional forest conditions. This circumstance is most likely to occur in the eastern Oregon Cascades, eastern Washington Cascades, and California Cascades Provinces, and somewhat less likely to occur in the Oregon Klamath and California Klamath Provinces. It is important to understand that some risk associated with fire and insects is acceptable because they are natural forces influencing late-successional forest development. Consequently, salvage to reduce such risks should focus only on those areas where there is high risk of large-scale disturbance.

6. Removal of snags and logs may be necessary to reduce hazards to humans along roads and trails, and in or adjacent to campgrounds. Where materials must be removed from the site, as in a campground or on a road, a salvage sale is appropriate. In other areas, such as along roads, leaving material on site should be considered. Also, material will be left where available coarse woody debris is inadequate.

7. Where green trees, snags, and logs are present following disturbance, the green-tree and snag guidelines will be applied first, and completely satisfied where possible. The biomass left in snags can be credited toward the amount of coarse woody debris biomass needed to achieve management objectives.

8. These basic guidelines may not be applicable after disturbances in younger stands because remnant coarse woody debris may be relatively small. In these cases, diameter and biomass retention guidelines should be developed consistent with the intention of achieving late-successional forest conditions.

9. Logs present on the forest floor before a disturbance event provide habitat benefits that are likely to continue. It seldom will be appropriate to remove them. Where these logs are in an advanced state of decay, they will not be credited toward objectives for coarse woody debris retention developed after a disturbance event. Advanced state of decay should be defined as logs not expected to persist to the time when the new stand begins producing coarse woody debris.

10. The coarse woody debris retained should approximate the species composition of the original stand to help replicate preexisting suitable habitat conditions.

11. Some deviation from these general guidelines may be allowed to provide reasonable access to salvage sites and feasible logging operations. Such deviation should occur on as small a portion of the area as possible, and should not result in violation of the basic intent that late-successional forest habitat or the development of such habitat in the future should not be impaired throughout the area. While exceptions to the guidelines may be allowed to provide access and operability, some salvage opportunities will undoubtedly be foregone because of access, feasibility, and safety concerns.

Standards and Guidelines for Multiple-Use Activities Other Than Silviculture

The following standards and guidelines apply to Late-Successional Reserves and Managed Late-Successional Areas.

Introduction - As a general guideline, nonsilvicultural activities located inside Late- Successional Reserves that are neutral or beneficial to the creation and maintenance of latesuccessional habitat are allowed.

While most existing uses and development are envisioned to remain, it may be necessary to modify or eliminate some current activities in Late-Successional Reserves that pose adverse impacts. This may require the revision of management guidelines, procedures, or regulations governing these multiple-use activities. Adjustments in standards and guidelines must be reviewed by the Regional Ecosystem Office.

Road Construction and Maintenance - Road construction in Late-Successional Reserves for silvicultural, salvage, and other activities generally is not recommended unless potential benefits exceed the costs of habitat impairment.

If new roads are necessary to implement a practice that is otherwise in accordance with these guidelines, they will be kept to a minimum, be routed through non-late-successional habitat where possible, and be designed to minimize adverse impacts. Alternative access methods, such as aerial logging, should be considered to provide access for activities in reserves.

Road maintenance may include felling hazard trees along rights-of-way. Leaving material on site should be considered if available coarse woody debris is inadequate. Topping trees should be considered as an alternative to felling.

Fuelwood Gathering - Fuelwood gathering will be permitted only in existing cull decks, where green trees are marked by silviculturists to thin (consistent with standards and guidelines), to remove blowdown blocking roads, and in recently harvested timber sale units where down material will impede scheduled post-sale activities or pose an unacceptable risk of future large-scale disturbances. In all cases these activities should comply with the standards and guidelines for salvage and silvicultural activities.

American Indian Uses - The exercise of tribal treaty rights will not be restricted by these standards and guidelines unless the Regional Interagency Executive Committee determines that the restriction is (1) reasonable and necessary for preservation of the species at issue, (2) the conservation purpose of the restriction cannot be achieved solely by regulation of non-Indian activities, (3) the restriction is the least restrictive available to achieve the required conservation purpose, (4) the restriction does not discriminate against Indian activities either as stated or as applied, and (5) voluntary tribal conservation measures are not adequate to achieve the necessary conservation purpose.

Mining - The impacts of ongoing and proposed mining actions will be assessed, and mineral activity permits will include appropriate stipulations (e.g., seasonal or other restrictions) related to all phases of mineral activity. The guiding principle will be to design mitigation measures that minimize detrimental effects to late-successional habitat.

Developments - Development of new facilities that may adversely affect Late-Successional Reserves should not be permitted. New development proposals that address public needs or provide significant public benefits, such as powerlines, pipelines, reservoirs, recreation sites, or other public works projects will be reviewed on a case-by case basis and may be approved when adverse effects can be minimized and mitigated. These will be planned to have the least possible adverse impacts on Late-Successional Reserves. Developments will be located to avoid degradation of habitat and adverse effects on identified late-successional species. Existing developments in Late-Successional Reserves such as campgrounds, recreation residences, ski areas, utility corridors, and electronic sites are considered existing uses with respect to Late-Successional Reserve objectives, and may remain, consistent with other standards and guidelines. Routine maintenance of existing facilities is expected to have less effect on current old-growth conditions than development of new facilities. Maintenance activities may include felling hazard trees along utility rights-of-way, trails, and other developed areas.

Land Exchanges - Land exchanges involving Late-Successional Reserves will be considered if they provide benefits equal to or better than current conditions. Consider land exchanges especially to improve area, distribution, and quality (e.g., connectivity, shape, contribution to biodiversity) of Late-Successional Reserves, especially where public and private lands are intermingled (e.g., checkerboard ownership).

Habitat Improvement Projects - Projects designed to improve conditions for fish, wildlife, or watersheds should be considered if they provide late-successional habitat benefits or if their effect on late-successional associated species is negligible. Projects required for recovery of threatened or endangered species should be considered even if they result in some reduction of habitat quality for other late-successional species. For example, watershed rehabilitation projects, such as felling trees along streams, will be coordinated with a wildlife biologist and may include seasonal restrictions. Design and implement watershed restoration projects in a manner that is consistent with Late-Successional Reserve objectives.

Range Management - Range-related management that does not adversely affect latesuccessional habitat will be developed in coordination with wildlife and fisheries biologists. Adjust or eliminate grazing practices that retard or prevent attainment of reserve objectives. Evaluate effects of existing and proposed livestock management and handling facilities in reserves to determine if reserve objectives are met. Where objectives cannot be met, relocate livestock management and/or handling facilities.

Fire Suppression and Prevention - Each Late-Successional Reserve will be included in fire management planning as part of watershed analysis. Fuels management in Late-Successional Reserves will utilize minimum impact suppression methods in accordance with guidelines for reducing risks of large-scale disturbances. Plans for wildfire suppression will emphasize maintaining late-successional habitat. During actual fire suppression activities, fire managers will consult with resource specialists (e.g., botanists, fisheries and wildlife biologists, hydrologists) familiar with the area, these standards and guidelines, and their objectives, to assure that habitat damage is minimized. Until a fire management plan is completed for Late-Successional Reserves, suppress wildfire to avoid loss of habitat in order to maintain future management options.

In Late-Successional Reserves, a specific fire management plan will be prepared prior to any habitat manipulation activities. This plan, prepared during watershed analysis or as an element of province-level planning or a Late-Successional Reserve assessment, should specify how hazard reduction and other prescribed fire applications will meet the objectives of the Late-Successional Reserve. Until the plan is approved, proposed activities will be subject to review by the Regional Ecosystem Office. The Regional Ecosystem Office may develop additional guidelines that would exempt some activities from review. In all Late-Successional Reserves, watershed analysis will provide information to determine the amount of coarse woody debris to be retained when applying prescribed fire.

In Riparian and Late-Successional Reserves, the goal of wildfire suppression is to limit the size of all fires. When watershed analysis, province-level planning, or a Late-Successional Reserve assessment are completed, some natural fires may be allowed to burn under prescribed conditions. Rapidly extinguishing smoldering coarse woody debris and duff should be considered to preserve these ecosystem elements.

Special Forest Products - Special forest products include but are not limited to posts, poles, rails, landscape transplants, yew bark, shakes, seed cones, Christmas trees, boughs, mushrooms, fruits, berries, hardwoods, forest greens (e.g., ferns, huckleberry, salal, beargrass, Oregon grape, and mosses), and medicinal forest products. In all cases, evaluate whether activities have adverse effects on Late-Successional Reserve objectives. Sales will ensure resource sustainability and protection of other resource values such as special status plant or animal species. Where these activities are extensive (e.g., collection of Pacific Yew bark or fungi), it will be appropriate to evaluate whether they have significant effects on latesuccessional habitat. Restrictions may be appropriate in some cases.

Recreational Uses - Dispersed recreational uses, including hunting and fishing, generally are consistent with the objectives of Late-Successional Reserves. Use adjustment measures such as education, use limitations, traffic control devices, or increased maintenance when dispersed and developed recreation practices retard or prevent attainment of Late-Successional Reserve objectives.

Research - A variety of wildlife and other research activities may be ongoing and proposed in late-successional habitat. These activities must be assessed to determine if they are consistent with Late-Successional Reserve objectives. Some activities (including those within experimental forests) not otherwise consistent with the objectives may be appropriate, particularly if the activities will test critical assumptions of these standards and guidelines, will produce results important for habitat development, or if the activities represent continuation of long-term research. These activities should only be considered if there are no equivalent opportunities outside Late-Successional Reserves.

Current, funded, agency-approved research that meets the above criteria is assumed to continue if analysis ensures that a significant risk to Aquatic Conservation Strategy objectives does not exist. Research Stations and other Forest Service and BLM units will, within 180 days of the signing of the Record of Decision for these standards and guidelines, submit a brief project summary to the Regional Ecosystem Office of ongoing research projects that are potentially inconsistent with other standards and guidelines of this document, but are expected to continue under the above research exception. The Regional Ecosystem Office may choose to more formally review specific projects, and may recommend to the Regional Interagency Executive Committee modification, up to and including cancellation, of those projects having an unacceptable risk to Late-Successional Reserve objectives.

Rights-of-Way, Contracted Rights, Easements, and Special Use Permits - Access to nonfederal lands through Late-Successional Reserves will be considered and existing right-of-way agreements, contracted rights, easements, and special use permits in Late-Successional Reserves will be recognized as valid uses. New access proposals may require mitigation measures to reduce adverse effects on Late-Successional Reserves. In these cases, alternate routes that avoid late-successional habitat should be considered. If roads must be routed through a reserve, they will be designed and located to have the least impact on late-successional habitat. Review all special use permits and when objectives of Late-Successional Reserves are not being met, reduce impacts through either modification of existing permits or education.

Nonnative Species - In general nonnative species (plant and animal) should not be introduced into Late-Successional Reserves. If an introduction of nonnative species is proposed, complete an assessment of impacts and avoid any introduction that would retard or prevent achievement of Late-Successional Reserve objectives. Evaluate impacts of nonnative species (plant and animal) currently existing within reserves, and develop plans and recommendations for eliminating or controlling nonnative species that are inconsistent with Late-Successional Reserve objectives. These will include an analysis of the effects of implementing such programs to other species or habitats within Late-Successional Reserves.

Other - Other activities should be evaluated by local interdisciplinary teams and appropriate guidelines should be written and documented. Activities deemed to have potentially adverse effects on Late-Successional Reserve objectives are subject to review of the Regional Ecosystem Office. The Regional Ecosystem Office may develop additional criteria for exempting some additional activities from review.

Protection Buffers

Protection Buffers are additional standards and guidelines from the Scientific Analysis Team Report for specific rare and locally endemic species, and other specific species in the upland forest matrix. The following rare and locally endemic species are likely to be assured viability if they occur within reserves. However, there might be occupied locations outside these areas that will be important to protect as well. Protocols for surveys will be developed that will ensure a high likelihood of locating these occupied sites, and such surveys will be conducted prior to ground-disturbing activities within the known or suspected ranges and within the habitat types or vegetation communities occupied by these species, according to the implementation schedule for Survey and Manage components 1 and 2 on pages C-4 and C-5 of these standards and guidelines. When located, the occupied sites need to be protected as follows.

Nonvascular Plants:

Ptilidium californicum (Liverwort) - This species is rare and has a very limited distribution in old white fir forests with fallen trees. It occurs on trunks of trees at about 5000-feet elevation. Mitigation options include finding locations and maintaining stands of overmature white fir at about 5000-feet elevation for inoculum and dispersal along corridors; and studying specific distribution patterns. Protect known occupied locations if distribution patterns are disjunct and highly localized by deferring timber harvest and avoiding removal of fallen trees and logs.

Ulota meglospora (Moss) - This species occurs in northern California and southwest Oregon. It is best developed (locally abundant) in very old stands of tanoak, Douglas-fir, and other conifer species further north, but is generally scarce throughout its range. The species is poorly known ecologically. Mitigation activities include conducting basic ecological studies, and surveying for presence, particularly in Oregon. Protect known occupied sites if distribution patterns are disjunct and highly localized. Defer timber harvest or other activities which would not maintain desired habitat characteristics and population levels.

Aleuria rhenana (Fungus) - This mushroom is widely distributed but rare and little known throughout its range, known from one collection from Mt. Rainier National Park. It is a conifer litter decomposer. Mitigation activities include conducting ecological studies and surveys to determine localities. Protect known populations if surveys continue to indicate that the population is rare. Defer ground-disturbing activities.

Otidea leporina, O. onotica, and *O. smithii* (Fungi) - These mushrooms occur in conifer duff, and are widespread in distribution but uncommon. They are dependent on older-age forests. Specific mitigation options include protecting older forests from ground disturbance where the species are located.

For the plants listed above, it is recommended that Regional or state office-level ecologists or botanists should: (1) maintain a spatially explicit data base of all known sites in National Forests and BLM Districts, and (2) develop species or area management plans, to be implemented under the guidance of the regional botany programs.

Amphibians:

Shasta Salamander - This species is very narrowly distributed, occurring only in localized populations on the Shasta-Trinity National Forest. Only a small part of its range is included within Habitat Conservation Areas identified by the Interagency Scientific Committee (1990) (status within Late-Successional Reserves has not been determined). It occurs in association with limestone outcrops, protected by an overstory canopy. All known and future localities must be delineated and protected from timber harvest, mining, quarry activity, and road building within the delineated site, and a buffer of at least the height of one site-potential tree or 100 feet horizontal distance, whichever is greater, should surround the outcrop. Additional surveys conducted using a standardized protocol must be undertaken to identify and delineate all occupied sites within the species' potential range.

Birds:

Great Gray Owl - Within the range of the northern spotted owl, the great gray owl is most common in lodgepole pine forests adjacent to meadows. However, it is also found in other coniferous forest types. In some locations, such as on the Willamette National Forest west of the crest of the Cascade Range, at least some shelterwood harvesting seems to be beneficial for the species by opening up otherwise closed canopy cover for foraging. In doing so, consequences to species such as northern goshawk and American marten must be evaluated. Specific mitigation measures for the great gray owl, within the range of the northern spotted owl, include the following: provide a no-harvest buffer of 300 feet around meadows and natural openings and establish 1/4-mile protection zones around known nest sites. Within one year of the signing of the Record of Decision for these standards and guidelines, develop and implement a standardized protocol for surveys; survey for nest locations using the protocol. Protect all future discovered nest sites as previously described.

Regional Ecosystem Office

333 SW 1st P.O. Box 3623
Portland, Oregon 97208-3623
Website: www.reo.gov E-Mail: REOmail@or.blm.gov
Phone: 503-808-2165 FAX: 503-808-2163

Memorandum

Date: May 12, 2003
To: Regional Interagency Executive Committee (See Attached Distribution List)
From: Anne Badgley, Executive Director /s/Anne Badgley
Subject: Assessment and Review of Proposed Research under the Northwest Forest Plan

Purpose: The purpose of this memorandum is to clarify implementation of certain Northwest Forest Plan (NWFP) provisions regarding research assessments and reviews.

Background: In 2001, the Regional Ecosystem Office (REO) received questions from field offices asking whether REO review of new proposed research is required. The REO prepared findings to clarify two aspects of the research questions:

1. Reviews. When is REO review of research required?
2. Assessments. Who assesses new research proposals and what factors should be considered?

This memorandum is based on interagency discussions (which included participation by research agency representatives) and review of NWFP provisions. Key NWFP provisions are attached and referenced below.

Findings: Reviews. The NWFP Standards and Guidelines (S&Gs) distinguish between ongoing and proposed research (S&Gs, pp. C-4, 18, 19 & 38). Project summaries of ongoing research, i.e., current, funded, agency approved research, were to be submitted to REO for review within 180 days after the date the NWFP Record of Decision (ROD) was signed (April 13, 1994). New research, i.e., research proposed after the NWFP was signed, does not require REO, Research and Monitoring Group (RMG), or Regional Interagency Executive Committee (RIEC) review. However, agencies may request REO or RMG assistance in conducting science reviews of new proposed research, particularly where independent, regional-scale, or interagency analysis is indicated. Requests should be submitted through the agency's RIEC executive to the REO Executive Director.

Assessments. The S&Gs (pp. C-4, 18 & 38) require that research be assessed to determine if it is consistent with the objectives of the standards and guidelines. The appropriate land manager is responsible for assessing proposed research and has discretion regarding how to conduct the assessment and documentation process. For example, the assessment and documentation may be completed in conjunction with the NEPA process.

The ROD states that, where appropriate, some research activities may be exempted from the standards and guidelines (ROD, p.15). The S&Gs further provide for this by indicating that some activities not otherwise consistent with the objectives of the standards and guidelines may be appropriate (S&Gs, pp. C-4, 18 & 38), particularly if the activities:

- Will test critical assumptions of these standards and guidelines;
- Will produce results important for habitat development; or
- If the activities represent continuation of long-term research.

In addition, the S&Gs (p. C-4) state that every effort should be made to locate non-conforming activities in land allocations where they will have the least effect upon the objectives of the standards and guidelines. (Language specific to Late-Successsional Reserves (LSRs) and Riparian Reserves (RRs) is provided in the S&Gs (pp. C-18 & 38)). This factor should be considered and documented during the assessment.

The land manager is responsible for identifying any proposed research activities that are inconsistent with the objectives of the standards and guidelines, for assessing whether the activities are appropriate, and for ensuring that appropriate efforts have been made to locate non-conforming activities in land allocations where they will have the least effect upon the objectives of the standards and guidelines. The land manager may then exempt research activities from the standards and guidelines where appropriate. All research activities must meet the requirements of applicable federal laws (ROD, p.15), including the Endangered Species Act, NEPA, etc.

Related Considerations: The REO identified other factors that may be helpful to ensure scientific credibility of proposed research (a basic principle of the NWFP). These factors are not specified in the NWFP, however, land managers may consider them if appropriate during design and assessment of new research proposals, particularly proposals which include activities inconsistent with the objectives of the standards and guidelines. Optional factors that may be appropriate to consider include:

1. The extent to which the proposed research represents credible science. The following questions may be helpful in evaluating whether the proposed research represents credible science:
   - What hypotheses will be tested by the proposed research, and how are they linked to assumptions or uncertainties in the S&Gs?
   - Is the proposed study design adequate to test the stated hypotheses?
   - What are the temporal and spatial zones of inference for the proposed research?
   - Has the proposal been the subject of an independent science review? If so, what are the results?
2. The potential of the research to contribute to scientific knowledge of importance beyond the local area.
3. The potential to modify the research proposal to make it more consistent with the objectives of the standards and guidelines.
4. The extent to which the desired results could be obtained if the research was modified to conform to the standards and guidelines.

This memorandum is intended for use as the basis for responding to future inquiries regarding research assessments and reviews. All RIEC executives are encouraged to distribute this memorandum to appropriate individuals in their agency. If you have comments or need additional information, please contact me at 503-808-2165, or your REO representative.

cc: REO/RMG reps
Ken Denton (FS)
John Cissel (BLM)

1819final.doc/kc

Attachment: NWFP Excerpts Related to Research Assessments and Reviews (2 pp.)

Distribution List for RIEC
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Elaine M. Brong, Bureau of Land Management
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NWFP Excerpts Related to Research Assessments and Reviews

This enclosure provides excerpts from the Northwest Forest Plan Record of Decision (ROD) and Standards and Guidelines (S&Gs) which are referenced in the accompanying memorandum on research assessments and reviews.

ROD, p. 15:
"An important component of this decision is the facilitation of research activities to gather information and test hypotheses in a range of environmental conditions. Although research activities are among the primary purposes of adaptive management areas and experimental forests, this decision does not intend to limit research activities to these land allocations. Where appropriate, some research activities may be exempted from the standards and guidelines of this decision. However, every effort should be made to locate non-conforming activities in land allocations where they will have the least adverse effect upon the objectives of the applicable standards and guidelines. All research activities must meet the requirements of applicable federal laws, including the Endangered Species Act."

S&Gs, p. C-4:
"A variety of wildlife and other research activities may be ongoing and proposed in all land allocations. These activities must be assessed to determine if they are consistent with the objectives of these standards and guidelines. Some activities (including those within experimental forests) not otherwise consistent with the objectives may be appropriate, particularly if the activities will test critical assumptions of these standards and guidelines, will produce results important for habitat development, or if the activities represent continuation of long-term research. Every effort should be made to locate non-conforming activities in land allocations where they will have the least adverse effect upon the objectives of these standards and guidelines.

Current, funded, agency-approved research that meets the above criteria, is assumed to continue if analysis ensures that a significant risk to Aquatic Conservation Strategy objectives does not exist. Research Stations and other Forest Service and BLM units will, within 180 days of the signing of the Record of Decision, submit a brief project summary to the Regional Ecosystem Office of ongoing research projects that are potentially inconsistent with other standards and guidelines in this document but are expected to continue under the above research exception. The Regional Ecosystem Office may choose to more formally review specific projects, and may recommend to the Regional Interagency Executive Committee modification, up to and including cancellation, of those projects that have an unacceptable risk [to] the objectives of these standards and guidelines."

S&Gs, pp. C-18,19:
"A variety of wildlife and other research activities may be ongoing and proposed in late-successional habitat. These activities must be assessed to determine if they are consistent with Late-Successional Reserve objectives. Some activities (including those within experimental forests) not otherwise consistent with the objectives may be appropriate, particularly if the activities will test critical assumptions of these standards and guidelines, will produce results important for habitat development, or if the activities represent continuation of long-term research. These activities should only be considered if there are no equivalent opportunities outside Late-Successional Reserves.

Current, funded, agency-approved research that meets the above criteria is assumed to continue if analysis ensures that a significant risk to Aquatic Conservation Strategy objectives does not exist. Research Stations and other Forest Service and BLM units will, within 180 days of the signing of the Record of Decision for these standards and guidelines, submit a brief project summary to the Regional Ecosystem Office of ongoing research projects that are potentially inconsistent with other standards and guidelines of this document, but are expected to continue under the above research exception. The Regional Ecosystem Office may choose to more formally review specific projects, and may recommend to the Regional Interagency Executive Committee modification, up to and including cancellation, of those projects having an unacceptable risk to Late-Successional Reserve objectives."

S&Gs, p. C-38:
"RS-1. A variety of research activities may be ongoing and proposed in Key Watersheds and Riparian Reserves. These activities must be analyzed to ensure that significant risk to the watershed values does not exist. If significant risk is present and cannot be mitigated, study sites must be relocated. Some activities not otherwise consistent with the objectives may be appropriate, particularly if the activities will test critical assumptions of these standards and guidelines; will produce results important for establishing or accelerating vegetation and structural characteristics for maintaining or restoring aquatic and riparian ecosystems; or the activities represent continuation of long-term research. These activities should be considered only if there are no equivalent opportunities outside of Key Watersheds and Riparian Reserves.

RS-2. Current, funded, agency-approved research, which meets the above criteria, is assumed to continue if analysis ensures that a significant risk to Aquatic Conservation Strategy objectives does not exist. Research Stations and other Forest Service and BLM units will, within 180 days of the signing of the Record of Decision adopting these standards and guidelines, submit a brief project summary to the Regional Ecosystem Office of ongoing research projects that are potentially inconsistent with other standards and guidelines but are expected to continue under the above research exception. The Regional Ecosystem Office may choose to more formally review specific projects, and may recommend to the Regional Interagency Executive Committee modification, up to and including cancellation, of those projects having an unacceptable risk to Key Watersheds and Riparian Reserves. Risk will be considered within the context of the Aquatic Conservation Strategy objectives."

S&Gs, pp. D-7, 8:
"Monitoring and research, with careful experimental design, will be conducted in Adaptive Management Areas. Research in forest ecology and management as well as social, biological, and earth sciences may be conducted. Each Adaptive Management Area will have an interdisciplinary technical advisory panel that will provide advice to managers and the local communities involved with this effort. The technical advisory panels will provide advice and information on the appropriateness of the project.

Direction and review are provided by the Regional Interagency Executive Committee, through the Regional Ecosystem Office. This review will help assure that plans and projects developed for the various Adaptive Management Areas will be both scientifically and ecologically credible. It will assure that new, innovative approaches are used, that the laws and the goals of the plan are met, and that validation monitoring is incorporated."

S&Gs pp. E-17, 18:
"The Research and Monitoring Committee will review and evaluate ongoing research; develop a research plan to address critical natural resource issues; address biological, social, economic, and adaptive management research topics; and develop and review scientifically credible, cost efficient monitoring plans; and facilitate scientific review of proposed changes to the standards and guidelines."

REGIONAL ECOSYSTEM OFFICE

333 SW 1st P.O. Box 3623
Portland, Oregon 97208-3623
Website: www.reo.gov E-Mail: reomail@or.blm.gov
Phone: 503-808-2165 FAX: 503-808-2163

MEMORANDUM

DATE: May 13, 2003

TO: Elaine M. Brong, OR/WA State Director, Bureau of Land Management

FROM: Anne Badgley, Executive Director */s/Anne Badgley*

SUBJECT: Timbered Rock Fire Salvage and Elk Creek Late-Successional Reserve Restoration – Butte Resource Area Clarification

This memorandum is in response to your request dated May 1, 2003 regarding clarification of interpretation of key concepts for the Timbered Rock Fire Salvage and Elk Creek Late-Successional Reserve Restoration – Butte Resource Area. The Late-Successional Reserves (LSR) interagency work group reviewed proposals for the Timbered Rock Environmental Impact Statement on May 1, 2003. The workgroup has provided several recommendations and findings as outlined below and requested additional review of the final proposed action (see item 3).

Your memo asked questions about four issues:

1. The 10 acre salvage stand-replacing standard and guideline (C-14) and Regional Ecosystem Office/ LSR Work Group exemption criteria – stand or project area basis

   The District requested clarification on scale of application of this Standard and Guideline (S&G) from the LSR Work Group. The Work Group concluded that the S&G listed on page C-14, number 1, is the standard that defines the appropriate threshold for salvage activities.

   "The potential for benefit to species associated with late-successional forest conditions from salvage is greatest when stand-replacing events are involved. Salvage in disturbed sites of less than 10 acres is not appropriate because small forest openings are an important component of old-growth forests."

   The Work Group concluded that proposals to salvage stands less than ten (10) acres in size within the burn perimeter would generally not be consistent with objectives for managing LSRs. Departures from this S&G would require a plan amendment.

   Treatments to reduce risk, however, can be designed to meet site-specific objectives for risk management. The Record of Decision (C-15) recognized that there may be instances where departure from salvage S&Gs may be necessary to reduce future risk of fire or insect damage to late-successional conditions. In these situations, the ROD states *"salvage to reduce such risks should focus only on those areas where there is a high risk of large-scale disturbance.*"

2. Use of snag and coarse woody debris levels from South Cascades Late-Successional Reserve Assessment (LSRA) and potential modification for dry vegetation within areas with frequent wildfire histories and moderate to high risks

   The Work Group concluded that if proposed amounts of standing dead and down wood proposed for retention in salvage units were estimated from the DECAID tool, then the proposed action would be

consistent with objectives for managing LSRs. Alternatively, the District could submit for review, an LSRA amendment with standing dead and down wood amounts derived from local data.

3. Research deviation from standards and guidelines

   The REO Research Monitoring Group (RMG) reviewed Attachment 2 ("Research Review Clarification") to your memorandum of May 1, 2003. That attachment stated: "… pending completion of the REO memo, we request written concurrence that under the NWFP: 1) authority to conduct the research assessment and exempt research as appropriate [r]ests with the appropriate agency official; 2) no REO/RMG/RMC review of proposed or new research activities is required under the NWFP; and 3) the agency official has discretion regarding how to conduct the assessment and documentation process."

   Since the REO memorandum clarifying NWFP provisions related to review and assessment of new research proposals was finalized on May 12, 2003, no advance concurrence is needed. Instead, the final memorandum is attached for your information. It includes findings that are consistent with your three statements (above), as well as other information that may be helpful during the assessment process.

4. South Cascade LSRA estimated maximum treatments and need for additional project review of proposed treatment levels

   As per our letter dated February 10, 1998, your LSRA provides sufficient framework and context for decisions involving future projects and activities. The letter also noted that project plans would be fine-tuned through Watershed Analysis, NEPA, and other site-specific treatment determinations. Once the final proposed action for the Timbered Rock EIS has been submitted, the LSR work group will complete its review based upon the silvicultural, risk, and salvage activities described in Chapter 4 of the LSRA.

   It appears that you and your staff have done a thorough job evaluating the potential impacts related to the proposed salvage and restoration activities. If you have any questions regarding the above conclusions, how to access the DECAID tool, or other related questions, please do not hesitate to contact Shawne Mohoric (503-808-2175).

Attachment:
Assessment and Review of Proposed Research under the Northwest Forest Plan

cc:
Mary Smelcer, Acting District Manager, BLM Medford District Officer
Larry Larson, BLM OR-931
Debbie Pietrzak, BLM, Regional Ecosystem Office Representative
Shawne Mohoric, LSR Work Group Chair

1827/ShM